

Vendors must have an active, approved master contract under the SITE program and be approved in the category or categories listed in the RFO document in order to respond to an RFO. Vendor is responsible for reading all addenda associated with the RFO.

# IT Professional Technical Services

## SITE Program

T#:14ATM

**Request for Offers (RFO)**

**For Technology Services**

**Issued By**

**Minnesota Department of Human Services (DHS), Disability Services Division**

**Project Title: eLearning Development and Instructional Design Staff Augmentation**

**Category: Training Tool Development**

**Seeking two (2) resources – an eLearning developer/programmer and an instructional designer/writer – from the same vendor.**

**This is a reposting of RFO0112. Please read the Proposal Submission Instructions carefully.**

### **Business Need**

The Minnesota Department of Human Services (DHS), through its Disability Services Division (DSD), is seeking an eLearning developer and an instructional designer to work on-site at DHS as part of the disability services training team. The contracted staff will increase training development capacity required to complete the design and development of online learning and testing modules. The contractor will work within Department of Human Services (DHS) – Disability Services Division (DSD) and will initially focus on the self-directed workforce unionization training initiative, but may be involved in other similar connected initiatives within DSD all which fall under the umbrella of the [DHS Olmstead Plan](#). This will include training for the self-directed workforce on how to implement person-centered support plans and support self-determination by program participants; supporting program participants in choosing and using a self-directed or participant-employer service model; and case managers and certified assessors who help program participants make informed choices about service models and develop support plans for program participants that are person-centered.

DSD will manage the deliverables and the contracted staff will be integrated into DSD's operations. All services must be person-centered focused in both planning and delivery. We are currently analyzing the full scope of our training needs. Training will be produced in collaboration with state staff. DSD will guide the development of the training content as well as the overall administration of the training and associated tests.

This project is closely aligned with DSD's strategic plan with the goals of supporting and enhancing the quality of life for people with disabilities and managing an equitable and sustainable long-term services and supports system that maximizes value. This work impacts a variety of stakeholders; therefore, training will need to be tailored to each specific audience. Stakeholders include:

- Participants and family members
- Individual workers / providers
- Provider agencies / organizations
- Assessors
- Case managers / care coordinators
- Internal business partners, including other divisions within DHS

Minnesota Department of Human Services is a leader in the development of services to allow individuals to remain in the community. These services include Personal Care Assistance (PCA) Choice, Consumer Support Grant (CSG), and Consumer Directed Community Supports (CDCS), which provide assistance with personal cares, health tasks, IADLs, etc., as determined by assessment and service planning.

On July 1, 2015, a Collective Bargaining Agreement (CBA) with Service Employees International Union (SEIU) went into effect related to direct support workers providing self-directed services in the programs of CDCS, CSG, and the PCA Choice model. The CBA includes requirements related to orientation for all workers as well as training opportunities. DHS has an existing online PCA worker test that is mandatory prior to enrollment and work being provided. CDCS and CSG workers do not have standard training that is required. As part of our ongoing quality work, as well as the CBA with SEIU, we are planning to develop and require basic training across programs with direct support workers (PCA, PCA Choice, CDCS, CSG and the future program that replaces all PCA: Community First Services and Supports (CFSS)).

In order to train the multiple populations impacted by self-directed services, a large training initiative has been working to identify the scope and requirements for online training that will certify education and knowledge. This RFO is focused on creating and implementing the training design and development work needed for self-directed workforce unionization training. The workforce training requires development of complementary training resources for persons using services and the case managers and certified assessors who help people make choices about service models and develop support plans that direct the work of direct support workers.

## **Project Deliverables**

This project is not specific to a deliverable of a specific product. Instead, the project is intended to provide additional capacity to augment existing DHS staff. The full scope assessment of DSD's training needs has not been determined to date. We expect an iterative process as this project is implemented and needs arise. All work will be in collaboration with DHS staff with DHS staff leading the overall project. Some examples of work that have already been identified include:

- Self-directed workforce training multimedia module development (ongoing design, development and updates), including the following:
  - Update the PCA orientation online training course and assessment content, provide a more engaging experience for the trainee, and embed the assessment within the training modules.
  - Create training videos to support participants in making informed choices about service models and the participant-employer role within self-directed services.
  - Create training videos for case managers and certified assessors responsible for ensuring participants make informed choices and that support plans are person-centered.
  - Updating the Steps for Success three-day in-person training program to a blended learning approach by creating prerequisites for this class that can be completed online.

- Loading training and assessments modules into the DHS Learning Management System (LMS) Pathlore and/or College of Direct Services.
- Testing training modules and tests for technical issues, accessibility and overall functionality (QA).
- Provide all digital assets (storyboards, documents, audio, video and code) and documentation at conclusion of contract.

### **Project Milestones and Schedule**

- Project is estimated to begin 7/1/2016 or as soon as the contract is in place.
- DSD will be integrating the contractor with state employees to augment our capacity in this area of expertise. DSD will manage the overall work because there are no defined project milestones during the project at this time.
- The estimated initial end date is 6/30/2017, but DHS retains the option to extend the contract in increments determined by the State.

### **Project Environment**

The contractor will work as a member of the Disability Services (DSD) Training, Technical Support and Communications (TTC) team at the Elmer L. Andersen building in downtown St. Paul. There are times where telecommuting is appropriate based on the type of work being done but directly embedding the developer within the DSD work environment will improve their understanding of the business needs, improve communication and production workflows and facilitate improved collaborative work between the instructional designer, subject matter experts, project managers and the application developers.

DSD also has internal training coordinators in the policy areas that will be available as needed in identifying needs and providing content. Project managers and other subject matter experts will be tracking deliverables. It is the responsibility of the contracted staff to manage their own work as delegated to them.

Currently, TTC staff's capacity to do extensive development work is limited. The TTC lead eLearning developer has other responsibilities but will be working collaboratively with the contractor. The supervisor of the TTC team holds a MEd in Learning Technologies and is familiar with the skills and capacities needed to design and develop online training. Along with TTC staff, the contractor will be working with a training coordinator, project manager, subject matter experts and DSD administration. The contractor will augment DHS staff to provide additional capacity to assure our ability to complete required work.

The TTC team does have adequate hardware and software to engage in this work and the identified eLearning developer will be provided with equipment by DHS. The TTC team currently uses the Adobe Creative Cloud / Captivate to develop most online training modules. Technical and training requests are organized and tracked through an internal SharePoint form.

### **Responsibilities Expected of the Selected Vendor**

DSD is seeking a dedicated 1.0 full-time equivalent eLearning developer/programmer and access to an instructional designer as needed, estimated to be about 0.5 full-time equivalent. The persons assigned to these roles will work with DHS staff on a variety of trainings for new initiatives with Disability Services. Individuals should be able to work collaboratively within this team environment. Vendor will also be asked to provide input into our strategic training work plan through participation on the workgroup tasked with developing the plan, especially identifying eLearning needs and how best to meet them.

The eLearning developer/programmer will design and develop online environments that will be the property of DHS and potentially be repurposed for future projects. The coding within the environment will contain proper comments that detail the structure and intent of the code so that future developers will be able to reuse the environment. A critical expectation is that the eLearning developer will design and develop online environments that meet accessibility standards (508 and W3C-WCAG2.0). Having knowledge and experience with accessibility will be a key factor in the evaluation process.

The instructional designer/writer will work collaboratively with the eLearning developer and DSD staff to assess and design an instructional approach that meets the training needs. This position will be involved full-time in the early stages of work and then be less involved as development work proceeds. They will continue to be involved during the entire course of the work but in a limited capacity.

**Mandatory Qualifications (To be initially scored as pass/fail. Thereafter, proposals where both resources meet the Mandatory Qualifications for their respective roles will be scored based in part on the extent to which the resources exceed the minimums. See RFO Evaluation Process, below.)**

- Vendor must be approved in the Training Tool Development SITE category.
- Individual proposed as the eLearning developer/programmer must have at least two years of experience in eLearning development using Adobe Creative Cloud/Captivate as development tools.
- Individual proposed as the instructional designer/writer must have at least two years of experience in instructional design.

### **Desired Skills**

- **Individual proposed as the eLearning Developer / Programmer**
  - Experience with user experience (UX) design
  - Experience with responsive design for web environments
  - Experience with HTML5/CCS/JavaScript
  - Experience with SCORM
  - Experience and compliance with Section 508 and W3C-WCAG2.0 Accessibility Standards
  - Experience with project management
  - Experience with multimedia production (video, audio, graphics)
- **Individual proposed as the Instructional Designer / Writer**
  - Adult learning theory background and experience
  - Experience in developing storyboards
  - Experience using plain language in training
  - Experience with narrative writing
  - Experience with leading content development process
  - Experience with designing training for a blended learning approach (classroom and online)
  - Experience working collaboratively with eLearning developer and subject matter experts
  - Understanding of issues within the disability community

### **Process Schedule**

Deadline for Questions	5/23/2016, 3:30 p.m. CDT
Anticipated Posted Response to Questions	5/27/2016
Proposals due	6/3/2016, 3:30 p.m. CDT
Anticipated decision	6/17/2016

## Questions

Any questions regarding this Request for Offers must be submitted via e-mail according to the date and time listed in the above Process Schedule to:

Jennifer Strei  
Minnesota Department of Human Services, Disability Services Division  
[Jennifer.M.Strei@state.mn.us](mailto:Jennifer.M.Strei@state.mn.us)

Robin Wegener  
Contract Manager, MN.IT Services  
[Robin.Wegener@state.mn.us](mailto:Robin.Wegener@state.mn.us)

(Please send to both e-mail addresses.)

Questions and answers will be posted via an addendum to the RFO on the Office of MN.IT Services website (<http://mn.gov/buyit/14atm/rfo/active.html>) according to the Process Schedule above.

**NOTE: This is a reposting of RFO0112. Selected Questions and Answers from RFO0112 have been attached for reference as Appendix A to this RFO.**

Other persons ARE NOT authorized to discuss this RFO or its requirements with anyone throughout the selection process and responders should not rely on information obtained from non-authorized individuals. If it is discovered that a Responder contacted State staff other than the individuals named above, the Responder's proposal may be removed from further consideration.

## RFO Evaluation Process

All responsive proposals received by the deadline will be evaluated by DHS. Proposals that meet the Mandatory Qualifications will be evaluated on the following five components, using a 100 point scale.

- Expressed understanding of project objectives (10 points)
- Qualifications/Experience of personnel working on the project (50 points)
- Overall management plan of how resources will be assigned as needed, including flexibility and capacity to provide additional resources based on both work needs and available funds (5 points)
- Vendor's experience in performing similar work (5 points)
- Cost (30 points)

The State reserves the right to interview a short-list of candidates who have received the highest scores. In the event interviews are conducted, technical scores may be adjusted based on additional information derived during the interview process.

The State also reserves the right to contact candidates' references and to adjust technical scores based on additional information derived from the reference checks.

This Request for Offers does not obligate the State to award a work order or complete the assignment, and the State reserves the right to cancel the solicitation if it is considered to be in its best interest. The State reserves the right to reject any and all proposals.

## Submission Format

The proposal should be assembled as follows:

1. **Cover Page**  
 Vendor Name, Address, City, State, Zip  
 Contact Name for Vendor  
 Contact's direct phone/cell phone (if applicable)  
 Contact's email  
 Resource Names being submitted
2. **Summary of Understanding:** Provide a detailed summary of the vendor's understanding of the agency business needs and project objectives and deliverables under this RFO.
3. **Overall Experience:**
  - a. Provide narrative for each resource (i.e., the eLearning developer and the instructional designer), including companies and contacts where your resources have demonstrated the mandatory qualifications as previously noted. If pass/fail requirements are not met, the State will discontinue further scoring of the proposal. Proposals where both resources meet the mandatory qualifications for their respective roles will be scored based in part on the extent to which the resources exceed the minimums.
  - b. Points will also be awarded based on the desired skills noted above. Provide one paragraph for each resource which highlights the resource's desired skills noted above.
  - c. Attach a resume for each of the proposed resources in addition to the narrative description. Be certain the resume has dates of work and notes whether the resource was an employee or consultant.
  - d. Also include the name of three (3) references for each resource who can speak to the resource's work on a similar project. Include the company name and address, reference name, reference email, reference phone number and a brief description of the project this resource completed.
4. **Overall management plan of how resources will be assigned as needed**
  - a. Demonstrate how resources will be assigned and how the Responder will accomplish the major tasks and deliverables described in this RFO.
  - b. Please detail any options for flexibility and capacity to provide additional resources based on both work needs and available funds.
5. **Cost Proposal. THE COST PROPOSAL MUST BE SUBMITTED AS A SEPARATE DOCUMENT FROM THE OTHER COMPONENTS OF THE PROPOSAL, AND NOT INCLUDED IN ANY OTHER PLACE IN THE SUBMISSION.**
  - a. Detail the hourly rate per role (i.e., all-inclusive hourly rate for eLearning developer/programmer and all-inclusive hourly rate for instructional designer/writer).
  - b. Provide a bottom-line all-inclusive "Total Estimated Annual Cost" based on 2080 hours per year for the eLearning developer/programmer and 1040 hours per year for the instructional designer/writer.
6. **Conflict of Interest Statement.** Responder must complete the conflict of interest statement as it relates to this project in accordance with the requirements set forth below.
7. **Required Forms.** Responder must complete and submit the following forms in response to this RFO:
  - a. Affirmative Action Certificate of Compliance (if over \$100,000, including extension options) <http://www.mmd.admin.state.mn.us/doc/affaction.doc>
  - b. Equal Pay Certificate Form (if proposals exceeds \$500,000, including extension options) <http://www.mmd.admin.state.mn.us/doc/equalpaycertificate.doc>

- c. Affidavit of non-collusion  
<http://www.mmd.admin.state.mn.us/doc/noncollusion-2.doc>
- d. Certification Regarding Lobbying (if over \$100,000, including extension options)  
<http://www.mmd.admin.state.mn.us/doc/lobbying.doc>

The STATE reserves the right to determine if further information is needed to better understand the information presented. This may include a request for a presentation.

## Proposal Submission Instructions

- **Each vendor may submit no more than three (3) proposals in response to this Request for Offers. Each proposal should include one (1) candidate for the eLearning developer/programmer role and one (1) candidate for the instructional designer/writer role. Resource substitutions will not be permitted during the evaluation process. If either candidate from a given proposal becomes unavailable during the evaluation process, the entire proposal will be removed from consideration.**
- Responses must be sent via email to [Robin.Wegener@state.mn.us](mailto:Robin.Wegener@state.mn.us) with the subject labeled "[Vendor Name] - DHS eLearning RFO". Response documents should be submitted in PDF format.
- Submissions are due according to the Process Schedule previously listed.
- **You must submit an email with your response or email notification that you will not respond to [MNIT.SITE@state.mn.us](mailto:MNIT.SITE@state.mn.us). Failure to do either of these tasks will count against your program activity and may result in removal from the program. The copy of the response that is sent to [MNIT.SITE@state.mn.us](mailto:MNIT.SITE@state.mn.us) is used for vendor performance tracking.**

## General Requirements

### Proposal Contents

By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

### Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

## **Disposition of Responses**

All materials submitted in response to this RFO will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Responder submits information in response to this RFO that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this RFO, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

## **Conflicts of Interest**

Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage. The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

## **IT Accessibility Standards**

All documents and other work products delivered by the vendor must be accessible in order to conform with the State Accessibility Standard. Information about the Standard can be found at: <http://mn.gov/mnit/programs/policies/accessibility/>.

## **Preference to Targeted Group and Economically Disadvantaged Business and Individuals**

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified



by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at [mmdhelp.line@state.mn.us](mailto:mmdhelp.line@state.mn.us). For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

### **Veteran-Owned Preference**

Unless a greater preference is applicable and allowed by law, in accordance with Minn. Stat. § 16C.16, subd. 6a, the Commissioner of Administration will award a 6% preference in the amount bid on state procurement to certified small businesses that are majority owned and operated by veterans.

A small business qualifies for the veteran-owned preference when it meets one of the following requirements. 1) The business has been certified by the Department of Administration/Materials Management Division as being a veteran-owned or service-disabled veteran-owned small business. 2) The principal place of business is in Minnesota AND the United States Department of Veterans Affairs verifies the business as being a veteran-owned or service-disabled veteran-owned small business under Public Law 109-461 and Code of Federal Regulations, title 38, part 74 (Supported By Documentation). See Minn. Stat. § 16C.19(d).

Statutory requirements and certification must be met by the solicitation response due date and time to be awarded the preference.

### **Work Force Certification**

For all contracts estimated to be in excess of \$100,000, responders are required to complete the Affirmative Action Certificate of Compliance and return it with the response. As required by Minnesota Rule 5000.3600, "It is hereby agreed between the parties that Minnesota Statute § 363A.36 and Minnesota Rule 5000.3400 - 5000.3600 are incorporated into any contract between these parties based upon this specification or any modification of it. A copy of Minnesota Statute § 363A.36 and Minnesota Rule 5000.3400 - 5000.3600 are available upon request from the contracting agency."

### **Equal Pay Certification**

If the Response to this solicitation could be in excess of \$500,000, the Responder must obtain an Equal Pay Certificate from the Minnesota Department of Human Rights (MDHR) or claim an exemption prior to contract execution. A responder is exempt if it has not employed more than 40 full-time employees on any single working day in one state during the previous 12 months. Please contact MDHR with questions at: 651-539-1095 (metro), 1-800-657-3704 (toll free), 711 or 1-800-627-3529 (MN Relay) or at [compliance.MDHR@state.mn.us](mailto:compliance.MDHR@state.mn.us).

**Appendix A: Selected Questions and Answers from Previous Posting (RFO0112)**

Q: Are there incumbent resources currently providing these services?

A: DHS currently has a contractor in a similar role working on a separate project. We have some state staff working on the training initiatives referenced in the RFO, and we are looking for contractor expertise to augment and complement the capacity of the existing team.

Q: How do you define training videos? For instance, live-action vs. animation vs. screen simulation? Or are you using the term “training videos” interchangeably with eLearning modules?

A: Training videos may incorporate various formats. There are a number of different applications for training videos including using screen capture / simulation with Adobe Captivate or traditional video production.

Q: When referring to the instructional designer toward the bottom of page 3, the RFO refers to “access” to an instructional designer. We would like to clarify whether the ID would be expected to be integrated into the onsite team similar to the developer. The alternative would be an ID resource who works primarily offsite, coming onsite for occasional face-to-face meetings.

A: Initially, DHS would like to have the instructional designer onsite to get integrated with the team and the projects. As time progresses, more of the work could be done offsite with the ability to bring the resource in for meetings as needed.

Q: In that same paragraph, it says the vendor will be asked to provide input into the strategic training work plan. Is there a specific resource from “vendor side” that you expect would provide this input (e.g. the developer and/or the ID)?

A: Both; this is a collaborative process and input from both roles are valued based the scope of work.